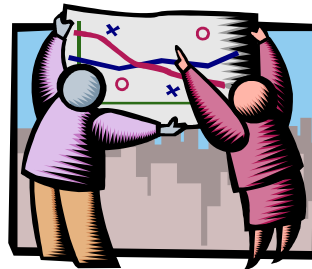


Providing Hope In Troubled Times Through Strategic Planning

Dr. Terri L. Tramel
2011 NASA PM Challenge



Disclaimer

- Fully realize that strategic planning responsibility for the agency lies with NASA HQ
 - 2010 NASA Strategic Plan was used as the basis of all division strategic planning.
- Fully realize that many other planning activities are going on around the division,
 - strategic planning can be a great organizational development tool
 - great tool for assisting the division in competitive proposal processes

Perfect Storm

NASA Uncertainty

Personal
Uncertainty

AEDC Strategic
Planning
Workshops

OPM Leadership
Courses

NASA APPL
Courses

4-D Professional
Coach

Industry
Experience



Golden
Opportunity-
Detail to Metals
Engineering to
exercise strategic
planning skills



US Army's
Leadership
Investment for
the Future

Perfect Storm

- Personal Uncertainty
 - Found myself without an assignment
 - Found myself without a MSFC safety net
 - I had no idea what role I'd have at NASA or MSFC
- NASA Uncertainty
 - No Ares, No Shuttle, No Technology
 - NASA roles were changing
 - No idea what direction congress/administration were going to move NASA toward

Perfect Storm

- ★ • Arnold Engineering Development Center, AEDC Strategic Planning Workshops
 - Trained how to plan and conduct strategic planning workshops on a large scale
 - Embarrassed to let anyone at MSFC know I could plan/facilitate strategic planning workshops
 - Process was too complicated, expensive and needed streamlining
- Industry Experience- Technicians and engineers involved with design reviews improved designs
- NASA APPI Courses
 - Leading Through Effective Communication
 - Project Management, Adv Project Management
 - Lesson's Learned, System Engineering

Perfect Storm

- OPM Leadership Courses
 - Leadership Potential
 - Leadership Assessment
- 4-D Leadership Course/Assessments
 - 1st Assessment in 2003, coach for a few months
 - 2nd Assessment in 2010, coach for over a year now
 - Naturally a yellow style(Including-bring integrity to relationships, and build teams)
 - Developed a NASA orange style (Directing-take organized action, direct others toward results)

Perfect Storm-Perfect Opportunity

- ★ • Developmental Detail to MSFC Metal Engineering Division
 - A chance to completely submerge myself in a new environment, to actually carve out a place for myself
 - A chance to actually put into use all these skills I've developed and learned
 - A chance to implement a bottoms up strategic planning process that I've been thinking about for years
 - Technicians, engineers, managers all involved with planning
 - An Engineering Organization that really wanted my skill set and willing for me to try out this strategic planning process!
 - Two wonderful supervisors willing to give me a chance
 - An opportunity to use 2011 as a developmental year
 - Transition charge codes
 - A great bunch of technically passionate people

Perfect Storm-Perfect Opportunity

- Army's Advanced Leadership Investment for the Future Program
 - 10 Month program, met once a month, class project, and senior leaders came in to talk. Sponsored by 3 star general deputy.
 - Based on Army's Field Manual on Leadership
 - Army culture requires leadership development at all levels. Performance appraisals assess your activities in "building the bench".
 - Many leadership assessments (EQ, DISC, and Strengths Finder)
 - Great people in the class from many different Army leadership positions
 - Class project is eMentorship (web based mentoring tool)
 - Call at graduation was to give back
 - I found my role/strengths in a team, as a leader
 - Arranger/catalyst/enjoy new challenges/mission focused/enabler



Perfect Storm-Perfect Opportunity

- Melinda, my 4-D coach
 - Helped me turn the uncertainty into a positive opportunity
 - Talk for one hour about every two weeks
 - Strengths Assessment- using your strengths and building your unrealized strengths energize you
 - Advisor for workshop designs
 - Provided me with a sounding board during this year long professional and personal journey (I knew I wasn't alone)

The Detail Plan

1. Identify all legal/procurement/process/policy constraints for strategic planning
 2. Develop EM30 Brochure
 3. Develop EM30 Partnership Survey
 4. Assist EM30 in Developing a Development Vision
 5. Proposal Calendar
 6. Develop Partnership Working Groups
 7. Develop a EM30 Research and Development Strategic Plan (Vision, Mission, Values, Goals, Objectives, and Action Steps)
- My decision to apply Servant Leadership Principles (from Adv LIFT Program)

Servant Leadership Principles

- A servant leader looks to the needs of the people and asks himself how he can help them to solve problems and promote personal development. It requires a understanding of identity, mission, vision and environment.
- The Servant Leader, by James A. Autry, published by Three Rivers Press, 2004
- Leading at a Higher Level, by Ken Blanchard, published by Blanchard Management Corporation, 2010, Chapter 14.
 - S: See the Future
 - E: Engage and Develop People
 - R: Reinvent Continuously
 - V: Value Results and Relationships
 - E: Embody the Values

Why We Choose a Bottoms Up Approach

- Everyone in EM30 has something to bring to the table (EM30's culture)
- There was a strong desire to provide input to management (by the team members) because of the NASA uncertainty
- Lessons learned from my industry days and AEDC experience
- Servant Leadership Principles
- Lessons learned from Adv LIFT classes

Support for a Bottoms Up Approach

- “Most adults don’t like being told where to go and what to do. They want to feel part of the process” (A Leaders Legacy, by Jim Posner and Barry Posner, published by Jossey-Bass, 2006.
- Inclusive strategic planning process addresses the six stages of concern people going through change experience :refinement, collaboration, impact, implementation, personal and information. (Leading at a Higher Level, by Ken Blanchard, published by Blanchard Management Corporation, 2010, Chapter 11.
- “Humans are naturally tribal with deep needs to feel we belong to groups” (How NASA Builds Teams by Charles Pellerin, Wiley Press, 2009
- “People need to Feel Included by You” (How NASA Builds Teams by Charles Pellerin, Wiley Press, 2009, Chapter 14

Strategic Planning Process We Used

Reports back to Division Team Members

DV Workshop

Analyze Our Partners

- Their needs
- Their potential growth
- Our relationship with them
- Educating other of our capabilities
- Modifying our processes
- In the FY12 environment
- Prioritization of potential topics through SWOT

Analyze Our Organization

- Vision
- Mission
- Values
- Goals
- Action Steps
- Shine the mirror at ourselves
 - Facilities
 - Expertise (People)
 - Current Experience
 - Past Experience
 - Stretch Potential

Branch Workshops

DV LD Workshop

Objectively process the information

Writing of the Plan

The Strategic Plan

Survey before
DV Workshop

Workshop Approach

- Workshop Planning
 - Upfront know what you want the workshop take a ways to be
 - Plan and anticipate group dynamics – use seating charts
 - Review the workshop plan and exercises with the customer
 - Prepare an extra exercise or two
 - Facilitate the workshop for full participation
 - Let the energy of the workshop flow



Report to team members



Report to team members



Report to team members



Report to team members



Report to lab management

“You Have To Provide Hope”

- Melinda said “What you are really trying to do in the workshops is to provide Hope, I’ll send you a paper.”
- Hopeful Leadership In Challenging Times, by Melinda Sinclair and Karen McKnight, Future Smart Leader, 2010.
- Hopeful thinking leads to more positive behaviors, increase performance, increase health and general well being, and increased business measures.
- $\text{Hope} = (\text{Goals} + \text{Pathways} + \text{Resources}) \times \text{Connections}$

Terri's Light Bulb Moment

- Look at the “soft side” equation from a different perspective, the strategic perspective
- Hope = groups emotional attachment (shared commitment) to the group vision
- Goals = strategic plan goals
- Pathways = strategic objectives
- Resource= organizational capabilities and expertise
- Connections = relationship with partners
- ★ • **You can instill HOPE into an organization by an organizationally inclusive strategic planning process**

Instilling Hope = Inclusive Strategic Planning Process

Workshop Surprises

- “Technicians won’t participate”-Technicians actually led table brief outs
- “The curmudgeon won’t participate”- The curmudgeon was a enthusiastic participant, was found smiling the next day, and continues to bring ideas for improvement to me.
- Several individuals submitted ideas for technology development topics that were for other subject matter experts.
- Several of the technical topics have been submitted for recent calls
- Several non-planned issues arose: organizational barriers, generational differences, partnership with local community colleges
- The passion for the collective core mission and the NASA mission support came through loud and clear
- The full participation by EVERY team member was apparent

Bottom's Up Benefits To The Organization

- Having common vision, mission, values and goals makes technical debates more productive and professional
- Suggestions keep coming in and come from surprising places
 - Diversity and Inclusion
- ★ Bring in work that matches peoples passion really makes them feel appreciated

Results to Date-Strategic Actions

- We have a draft Division Strategic Plan, but it has not been signed.
- The plan has a checklist that we are basically working through (with management acknowledgement)
- Entire organization is working on relationship building
- We have new Space Act Agreements in strategic areas
- We are looking at how we fit into our lab, center, NASA, industry partners, and other government partners.

Results to Date-Organizational

- Division manager and I have been asked to perform strategic planning activities at the lab level
- Other division and branches are asking for assistance in strategic planning.
- Division manager has incorporated goals we learned from the Army Adv LIFT Program into all of our leadership folks performance appraisals.
- Team members feel that their ideas are being heard and used by the Division and Lab management.
- I get regular visits by team members
 - Candy bowl helps

The Detail Plan Results

1. Identify all legal/procurement/process/policy constraints for strategic planning (Constantly evolving activity, we've done some trail blazing)
 2. Develop EM30 Brochure (Complete)
 3. Develop EM30 Partnership Survey (2010 survey complete)
 4. Assist EM30 in Developing a Development Vision (complete)
 5. Proposal Calendar (OSAC has this)
 6. Develop Partnership Working Groups (About 5 going at different levels)
 7. Develop a EM30 Research and Development Strategic Plan (Vision, Mission, Values, Goals, Objectives, and Action Steps) (Draft complete, implementing the checklist)
 8. I was asked to stay! I found a home.
- My decision to apply Servant Leadership Principles (from Adv LIFT Program) (I feel it has helped me develop strong relationships with the team members, lab management, other center organizations, and center management)

Results to Date-Personally

- I got to look in that mirror, it wasn't fun, but it was a path to self realization.
- I find myself wanting to find opportunities that allow me to be the planner and then the catalyst for execution of the mission.
- I realize that trying to be the leader that I believed NASA wanted me to be was going to drain me, and I wouldn't be happy. Being the leader I am naturally is energizing.
- My emotional quotient was higher than the national average and much higher than the average engineer!
- I still need to learn how to write a short, concise, understandable plans.
- I would like to get more training as a facilitator

Golden Nuggets

- Take advantage of opportunities, those you make and those that come unexpectedly.
- Don't be embarrassed of your “soft skills”, learning how to conduct strategic planning processes is OK in a technical organization
- People come in all different packages, letting them use their natural strengths to contribute to the organization, it improves morale.
- Report back to the workshop participants in a timely fashion, let them know how their inputs were used
- You can instill HOPE into an organization by an organizationally inclusive strategic planning process
- An inclusive strategic planning process embraces the goals of Diversity and Inclusion, everyone is heard no matter what their background.

Conclusion

- During times of turmoil, make the time to strengthen your organization
- Strategic planning is NOT producing a plan that no one reads, but can be a process to pull your people together toward a common vision, to accomplish a common mission, in a manner consistent with common values, with everyone given a voice in the process.
- Collectively understanding each other's skills and passions, allows the organization to take advantage of unexpected opportunities.
- The strategic planning process can be used to give hope to an organization during trouble times.